Southern Alberta Landscapes

MEETING THE CHALLENGES AHEAD ▶▶

Social/Economic Aspects

Prepared for
Alberta Environment
By UMA Engineering, S.N.Kulshreshtha,
and Russell Consulting
2004

Alberta

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Any comments, questions or suggestions on the content of this document may be directed to:

Regional Environmental Management
Alberta Environment
3rd Floor, Deerfoot Square
2938 - 11 Street N. E.
Calgary, Alberta T2E 7L7
Ph: (403) 297-7602
Fx: (403) 297-6069

Additional print copies of this document are available from:

Information Centre
Alberta Environment
Main Floor, Oxbridge Place
9820-106 Street
Edmonton, Alberta T5K 2J6
Ph: (780) 427-2700
Fx: (780) 422-4086
Outside of Edmonton dial 310-0000 for toll-free connection
Email: env.infocent@gov.ab.ca

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Contents

		Page No.
1.0	**Introduction**	
1.1	Human Population	3
1.1.1	Geographical Scope	3
1.1.2	Regional Population	4
1.1.3	Spatial Distribution of Regional Population	6
1.1.4	Rural / Urban Population Distribution	7
1.1.5	Population Density	8
1.2	Economic Sectors	10
1.2.1	Regional/Provincial	13
1.2.2	Intra-Regional	13
1.3	Sectoral Production Levels	16
1.4	Imports and Exports	17
1.5	Summary	18
2.0	**Historical Trends**	**19**
2.1	Population	19
2.1.1	General	19
2.1.2	Provincial and Regional Population Growth	19
2.1.3	Intra-Regional Trends	20
2.1.4	Major Urban Centres	21
2.1.5	Intra-Regional Shifts in Population Shares	21
2.1.6	Components of Population Change	22
2.2	Economic Sectors	24
2.3	Capital Infrastructure	26
2.4	Personal Income	29
2.5	Summary Historical Trends	32
3.0	**Quality of Life**	**33**
3.1	Incomes	33
3.1.1	Provincial and National Perspective	33
3.1.2	Regional Perspective	34
3.2	Distribution of Health/Educational/Government	37
3.3	Population Dynamics by Age	39
3.3.1	National Perspective	39
3.3.2	Provincial Perspective	39
3.3.3	Regional Perspective	40
3.4	Population to Employment Ratios	41
3.5	Education Attainment	43
3.6	Summary	44
4.0	**Current Economic Climate in Alberta**	**45**
4.1	Department of Learning	46
4.2	Transportation	46
4.3	Municipal Affairs	48
4.4	Ministry of Sustainable Resource Development	48
4.5	Ministry of Environment	49
4.6	Alberta Agriculture	50
4.7	Summary	

51
5.0 Summary and Observations **52**
5.1 Summary 52
5.2 Observations 53

Appendix A – SAL Population
Appendix B – Value of Sales and GDP
Appendix C – Investment Profiles

List of Tables

Table 1-1 Regional Population by Census Division, 2001 6
Table 1-2 Urban /Rural Population by Census Division 8
Table 1-3 Population Density by Census Division 10
Table 1-4 Employment by Economic Sectors Comparison 13
Table 1-5 Percentage of Employment by Economic Sector, 1996 15
Table 1-6 Sales and GDP by Sector 16
Table 1-7 SAL Imports and Exports Outside of Alberta 17
Table 2-1 Historical Population Trends 20
Table 2-2 Historical Population Trends – Major Urban Centres 21
Table 2-3 Historical Shift in Regional Share of Population 22
Table 2-4 Employment Change by Sector 1981 to 1996 Census Div 25
Table 3-1 Median Family Income – Region 35
Table 3-2 Median Family Income – Census Subdivisions 36
Table 3-3 Government, Education and Health Care Employment 37
Table 3-4 Health Care and Education Employment/ 100 Population 38
Table 3-5 Population / Employment Ratios 42

List of Figures

Figure 1.1 SAL Region with Census Divisions 5
Figure 1.2 Sector Sales 2001 17
Figure 2.1 Alberta Investment Profile 26
Figure 2.2 Annual Investment per Dollar of Sales 27
Figure 2.3 Alberta Sector Reinvestment Rate 28
Figure 2.4 Provincial Income Per Tax Returns 29
Figure 2.5 SAL Region Average Per Income Tax Return 30
Figure 2.6 SAL Region Urban and Rural Census Divisions 31
Figure 2.7 Rural Urban Average Income Tax Per Tax Return 32
Figure 2.8 Comparison of Income to Population Change 33

1.0 Introduction

The Alberta Government has initiated a study called The *Southern Alberta Landscapes: Meeting the Challenges Ahead* (SAL) of the southern Alberta region. The government is committed to the wise management of Alberta's natural resources and environment for the benefit of all Alberta's present and future generations and has outlined its policy in (*Commitment to Sustainable Resource and Environmental Management* (Alberta, March 1999). Regional strategies are one means by which direction in the Commitment document is being put into effect.

The strategy will look at social, economic, and environmental information for southern Alberta to take stock of our current situation and to assess the consequences of potential changes over the next two generations. Its purpose will be to identify the issues that need to be addressed to ensure a sustainable future – how can we meet our social and economic needs whilst ensuring reasonable environmental quality? The goal is to ensure a continuing high quality of life. The regional strategy will provide an opportunity to develop a strategic vision of the future for all southern Alberta that provides for all these benefits society wants; it will also provide an agenda for addressing key issues and outline a game plan to ensure that we achieve the vision.

This report is intended as an overview report of the current economic and demographic conditions in the southern region. An understanding of "where we are" is essential to understanding potential future conditions.

This report assesses current conditions under the topics of: population numbers and distribution, employment in the region's various economic sectors, and economic activity in the region. Historical trends for some of the above information have also been identified. Quality of life measures have also been addressed to determine how the regional population is faring as compared to Alberta's and Canada's populations. Current economic initiatives by the provincial government are highlighted to assist in identifying economic incentives in the southern region.

1.1 HUMAN POPULATION

1.1.1 Geographical Scope

The *Southern Alberta Landscapes: Meeting the Challenges Ahead* study area comprises all of the Grasslands Natural Region, the South Saskatchewan River Basin and the Cypress Hills (Figure 1). This includes about 20% of the province.

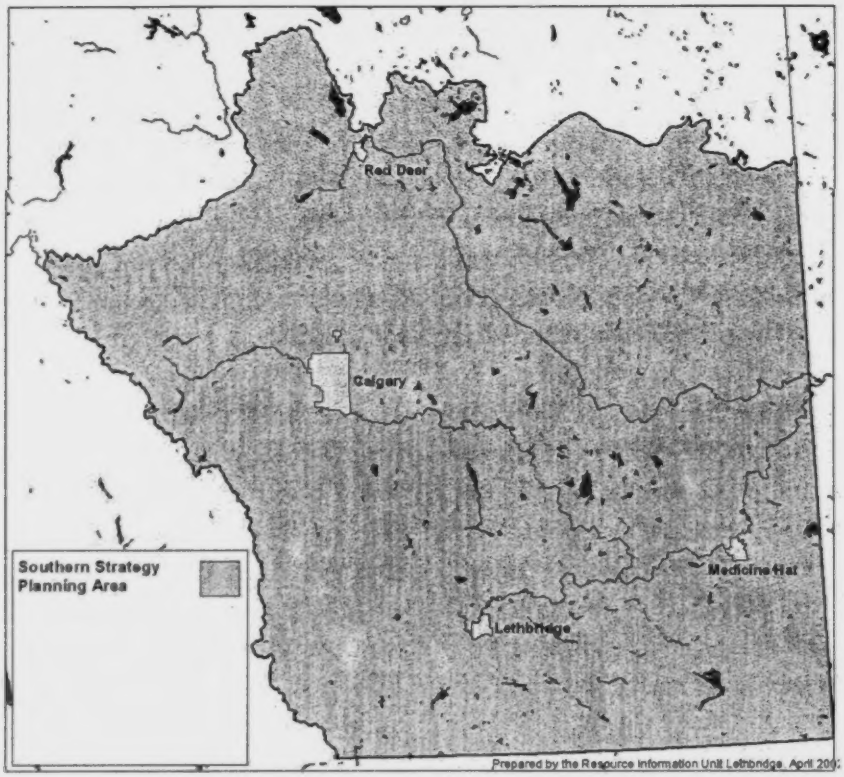


Figure 1.1

SAL Region Study Area

The region contains diverse physiographic, climatic and ecological systems. It extends from the semi-arid plains along the Alberta/Saskatchewan border, through the Rocky Mountain foothills into the Rocky Mountains themselves. An east to west transect along the Trans-Canada Highway would encounter the dry mixed grass, mixed grass, fescue grass, aspen parkland, mountain, subalpine and alpine ecoregions. The low boreal mixed wood, mid boreal mixed wood and upper boreal cordilleran ecoregions are also present within the Southern Alberta Region.

1.1.2 Regional Population

The regional population has been derived from the census data available from Statistics Canada. The northern boundary of the region does not conform precisely to the boundaries of census divisions (CD) or the municipalities that constitute census subdivisions. Where the regional boundary runs through rural municipalities, the population was estimated by allocating the municipal population according to the geographical proportion of the municipality within the region. The populations of urban municipalities near the northern regional boundary were assigned either entirely inside or outside of the region, based on the location of these places relative to the northern boundary of the South Saskatchewan River watershed.

Appendix A provides a list of the municipalities/census subdivisions that are wholly or partially within the region, along with their proportional population. The population figures are aggregated to the census division and regional level to show how the regional population has been determined.

The regional population includes the following census divisions (Figure 1):

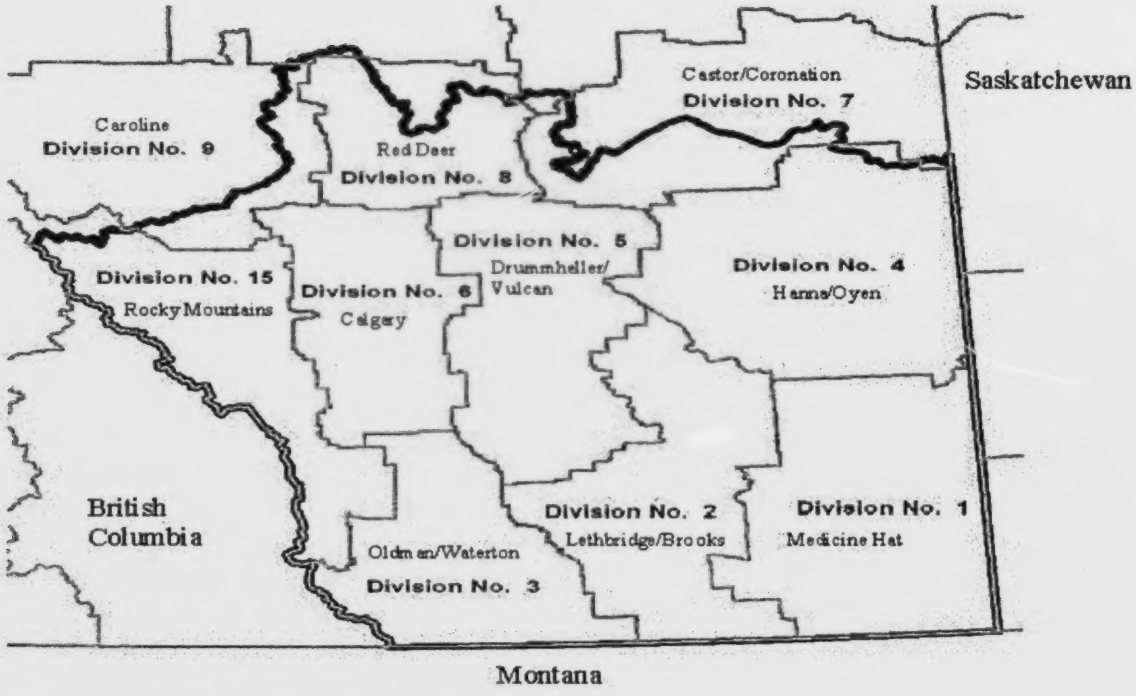
- the entire population of Census Divisions 1(Medicine Hat) 2 (Lethbridge/Brooks) 3 (Oldman / Waterton) 5 (Drumheller / Vulcan) and 6 (Calgary)
- most of the population of Census Division 4 (99.1%) (Hanna / Oyen) Census Division 8 (83.5%) (Red Deer) and Census Division 15 (86.1%) (Rocky Mountains)
- about one-fifth of the population of Census Division 7 (19.8%) (Castor/Coronation) and Census Division 9 (15.2%); (Caroline) and
- minor portions of Census Division 10 (1.6%) (Camrose) and Census Division 11 (0.04%) (Edmonton).

The population of the region shown by census division or partial census division is summarized in Table 1-2. Each census division is given a name to provide a geographic reference. Each name is based on a central urban centre or centres or other geographic feature. These names are for the purposes of this report only; they are not used by Statistics Canada.

The regional population was 1,488,239 in 2001 according to Statistics Canada. By comparison, the population of Alberta in 2001 was 2,974,239. Thus the regional population is one-half (50.05%) of the population of Alberta.

Figure 1.2

SAL Region with Census Divisions



1.1.3 Spatial Distribution of Regional Population

The regional population is very unevenly distributed within its geographic area. The spatial distribution of population reflects the interplay of a range of geographic, climatic, transportation, economic and historical factors.

Table 1-1

SAL Regional Population by Census Division, 2001

Census Division	Population, 2001	% of Regional Population
Alberta	2,974,807	
Regional Population as percentage of Alberta Population, 2001:	50.03%	
11. Edmonton (0.04%)	428	0.03
10. Camrose (1.6%)	1,336	0.1
9. Caroline (15.2%)	2,972	0.2
7. Castor / Coronation (18.9%)	7,656	0.5
4. Hanna / Oyen (99.1%)	11,194	0.8
15. Rocky Mountains (86.1%)	29,345	2.0
3. Oldman / Waterton	37,850	2.5
5. Drumheller / Vulcan	47,606	3.2
1. Medicine Hat	67,402	4.5
8. Red Deer (83.5%)	127,747	8.6
2. Lethbridge/Brooks	133,913	9.0
6. Calgary	1,021,060	68.6
TOTAL	**1,488,509**	**100.0**

Generally, the spatial distribution of population presents a pattern of "heartland/hinterland". Population is concentrated in major urban regions and along specific corridors, while large areas, notably the semi-arid eastern agricultural areas and the mountainous western areas are sparsely populated.

- (fits with 2.1.4)

The uneven distribution of population is discussed further in the next two sections on urban/rural population distribution and population density.

1.1.4 Rural/Urban Population Distribution

A great range in the level of urbanization (proportion of a CD's population that lives in incorporated cities or towns) is evident within the Southern Alberta region. As shown in Table 1-2, the degree of urbanization ranges from a high of 94.0% for CD6, Calgary, to a low of 26.4% urban for CD4, Hanna/Oyen. There is a clear clustering of urbanized Census Divisions related to the presence of larger centres. The five CDs dominated by larger urban centres have a level of urbanization ranging from 68.6% to 94.0%. The five CDs that are more rural are those agricultural areas that do not support larger urban centres. For these CDs, the level of urbanization ranges from 26.5% to 46.6%. None of these CDs contain an urban centre with a population greater than 10,000.

Table 1-2

Urban/Rural Population by Census Division

	Census Division	Population, 2001	Urban Population, 2001		Rural Population, 2001	
			No.	%	No.	%
6.	Calgary	1,021,060	959,386	94.0	61,674	6.0
1.	Medicine Hat	67,402	57,428	85.2	9,974	14.8
2.	Lethbridge/Brooks	133,913	100,447	75.0	33,466	25.0
15.	Rocky Mountains*	34,068	24,160	70.9	9,908	29.1
8.	Red Deer*	153,049	105,331	68.8	47,718	31.2
3.	Oldman/Waterton	37,580	17,507	46.6	20,073	53.4
5.	Drumheller/Vulcan	47,606	18,441	39.6	28,765	60.4
7.	Castor*	40,407	13,326	33.0	27,081	67.0
9.	Caroline*	19,573	6,208	31.7	13,365	68.3
4.	Hanna/Oyen*	11,300	2,986	26.4	8,314	73.6
Alberta		2,974,807	2,405,160	80.9	569,647	19.1

Spatially, the level of urbanization reinforces the "heartland/hinterland" pattern mentioned in Section 1.1.2. The highly urbanized Census Divisions include the Red Deer, Calgary, Lethbridge/Brooks and Medicine Hat Census Divisions.

In fact, the Rocky Mountain Census Division would have a higher level of urbanization if it were not for the characterization of about two-thirds of the population of the Municipality of Crowsnest Pass as rural. The population in the Rocky Mountain Census Division also highly urbanized, reflecting sparse rural populations in Banff National Park and adjacent protected areas and provincial forests. Generally, high levels of urbanization coincide with those Census Divisions dominated by larger urban centres, while a higher proportion of rural population is associated with a predominately agricultural economy.

Three of the highly urbanized census divisions also have rural populations that are higher in absolute numbers than the less urbanized census divisions. Approximately 60% of the SAL rural population is in census division 1 (Medicine Hat), census division 2 (Lethbridge/Brooks) and census division 6 (Calgary).

1.1.5 Population Density

Census Divisions/Sub-regions

Population density provides a measure of the total urban and rural populations relative to the size of the Census Division. Table 1-3 shows the population by Census Division in descending order of population density and of total population.

The data shows a strong correlation between total population and population density, as the size of the Census Divisions varies by a factor of less than three.

Again, a great range in population densities is evident. CD6, Calgary, with a population of over two-thirds of the regional population is by far the highest density at 80.8 persons per square kilometre. CD8, Red Deer, follows with a density of 15.4 persons per square kilometre, reflecting both a fairly high level of urbanization and a more dense rural population.

The lowest population density on a sub-regional basis is 0.5 persons per square kilometre for CD4, Hanna/Oyen. The Census Division is characterized by sparsely populated agricultural areas and few, small urban centres. CD15, Rocky Mountains, and CD9 Caroline/Clearwater, have low population densities of 1.2 and 1.0 persons per square kilometre respectively. Both Census Divisions are characterized by having large, sparsely populated forested and agricultural areas with few urban centres.

Table 1-3

Population Density by Census Division

Census Division		Population, 2001	Land Area in Square Kilometres	Population Density, Persons per Square Kilometre, 2001
6.	Calgary	1,021,060	12,642	80.8
8.	Red Deer*	153,049	9,908	15.4
2.	Lethbridge/Brooks	133,913	17,655	7.6
1.	Medicine Hat	67,402	20,516	3.3
5.	Drumheller/Vulcan	47,606	16,775	2.8
3.	Oldman/Waterton	37,580	13,866	2.7
7.	Castor*	40,407	19,204	2.1
15.	Rocky Mountains*	34,068	28,400	1.2
9.	Caroline*	19,573	18,921	1.0
4.	Hanna/Oyen*	11,300	21,466	0.5
Alberta		2,974,807	639,987	4.6

NOTES:

1. Populations and land areas are for entire Census Divisions, although those CDs with an asterisk (*) are only partially within the Southern Alberta Region.

2. CDs 10 and 11 are not listed, as they contain a negligible portion of the regional population.

Census Subdivision/Municipality

The extremes in population density are obscured in Table 1-3, as the values given are averages over the entire Census Division comprising both urban and rural landscapes. Municipal boundaries facilitate a more detailed comparison between truly urban and rural areas. However, urban municipal boundaries tend to enclose substantial rural areas to accommodate future urban growth. Therefore, urban densities may be influenced by the extent to which municipal boundaries. Extend into surrounding rural areas.

With these comments noted, the highest urban densities in the region are as follows:

Urban densities greater than 1,000 persons per square kilometre:

- Town of Banff;
- City of Calgary;
- Town of Blackfalds; and
- City of Red Deer.

Rural municipal densities from 3.5 to 7.6 persons per square kilometre:

- Lethbridge County;
- Red Deer County;
- Foothills County; and
- Rocky View County.

Rural municipal densities with less than one person per square kilometre:

- Improvement District 12 (Kananaskis)
- MD of Ranchland 66;
- Special Areas 2, 3 and 4
- Improvement District 9 (Banff National Park);
- Improvement District 4 (Waterton National Park);
- Forty Mile County;
- Bighorn County
- Cypress Counties; and
- Vulcan County
- Paintearth Counties.

To generalize, the most sparsely populated rural municipalities are those on the periphery of the region within agricultural, forestry or recreational areas. The most densely populated rural municipalities are those adjacent to three of the four largest urban centres, Medicine Hat being the exception. These municipalities adjacent to urban centers have high population densities. In addition, higher rural population densities may reflect smaller farms typical of irrigated areas adjacent to Calgary and Lethbridge.

1.2 Economic Sectors

Economic activity in the province of Alberta is comprised of a multitude of small and large, private and public businesses. These can be categorized as primary, manufacturing, and service industries. Primary industry are directly dependent on natural resources specific to the province such as tillable land, forests and minerals which typically produce commodities that are indistinguishable among producers. Manufacturing industries combine commodities, intermediate manufactured products, labor and capital to produce manufactured products. Great effort is exerted by industries in this category to generate distinguishable manufacturing brands with market and price advantages. Service industries include: support to business and to private individuals such as retail stores, professional services, education, and government services. The maturity of an economy and the well being of the populace can be measured by the relative size of its service industry. Primary industry typically prevails in underdeveloped economies while the manufacturing and service industries prevail in a developed economy. Primary and manufacturing industries are essential though as fuel for the regional economic engine.

Sectors are defined as groups of firms producing a homogeneous product with homogeneous technologies. Sector designations are based on standard industry classification codes. Economic statistics are often reported on a sectoral basis. The degree of sector aggregations will vary from very few general sector aggregations to a hundred plus sector designations. The degree of aggregation depends on the expected interest of the audience, publishing space, and on confidentiality considerations by Statistics Canada.

The degree of aggregation for some of the economic information contained herein is based on the SAL regional Input-Output (I-O) model developed as a component of this project. The I-O model is based on a 28 sectoral classification. The 28 sectors are constant with Standard Industry Classification codes used by Statistics Canada. A 20-sector transactions model was obtained through Statistics Canada. Four sectors were subdivided to generate a 28-section SAL regional input – output model.

Information contained herein will be based on combinations of 728 sector aggregations. The seven aggregations reflect availability of Statistics Canada data such as historical trends. Other combinations of sectors were used to summarize information by key sector groups.

The following is a list of the 28 sectors included in the I-O model for the SAL region. The far right column identifies those sectors, which were further subdivided from the basic transactions data supplied by Statistics Canada.

IO Sector Number	General Category	Statistics Canada Category	Subcategory for SAL Analysis
	Primary		
		Agriculture	
1			Non-irrigated agriculture
2			Irrigated agriculture
3			Confined feedlot operations
4		Fishing and trapping	
5		Logging and forestry	
		Mining	
6			Other mining
7			Crude petroleum& natural gas
	Manufacturing		
8			Meat slaughtering
9			Other food processing
10			Petroleum refining
11			Other manufacturing
	Service		
12		Construction	
13		Transportation & storage	
1		Communications & utilities	
14			Communications
15			Other utilities
16		Wholesale trade	
17		Retail trade	
18		Finance, insurance & real estate	
19		Business services	
20		Education services	
21		Health & social services	
22		Accommodations & food services	
23		Other services	

24	Operating, office, cafeteria & laboratory
25	Travel & entertainment
26	Transportation margins
27	Non-profit organizations
28	Government sector

1.2.1 Regional/Provincial Economy

The regional economy is very similar to the provincial economy when viewed from the perspective of employment by economic sector. According to Table 1-4, employment in agriculture and the resource industry sector is slightly lower than the province. The manufacturing and construction and the trade sectors are the same, while the finance/real estate sector is slightly higher in the region. However, health and education has lower employment in the region than in the province, which may reflect the location of major educational and medical institutions in northern Alberta. On the other hand, the business service sector is considerably better represented in the region than in the province, while the 'other' service sector is lower in the region.

Table 1-4

Employment by Economic Sectors
Comparison of Region and Province - 2001

Sector	Province		Region[1]	
	Number	%	Number	%
Agriculture/Resource Industry	184,105	10.9	88,631	10.2
Manufacturing/Construction	264,940	15.8	137,225	15.8
Trade	258,740	15.4	133,100	15.4
Finance/Real Estate	84,335	5.0	46,480	5.4
Health and Education	259,050	15.4	126,680	14.6
Business Services	316,265	18.8	180,880	20.9
Other Services	314,545	18.7	152,505	17.7
TOTAL	**1,681,980**	**100.0**	**865,861**	**100.0**

NOTES:

1. The region, for the purposes of this analysis, comprises Census Divisions 1 to 6, 8 and 15.

1.3 Sectoral Production Levels

Total sales and GDP generated by each of the 28 sectors are included in Appendix B.[1]

A twelve-sector aggregation was developed with the intent to combine primary production with its associated manufacturing activities (Table 1-5, and Figure 1-3). Meat slaughtering and other food processing is combined with agricultural products. Petroleum refining is combined with oil and gas.

Table: 1-5

Sales and GDP by Sector

Sector	SAL Sales $ Million	Percent of SAL Region (Sales)	SAL GDP $ Million	Percent of SAL Region (Sales)	Alberta Sales	SAL as % of Alberta (Sales)
Agric & Agric Processing	10,357	10	2,194	4	14,240	73
Oil & Gas & Refining	8,996	9	5,044	10	26,175	34
Logging	103	<1	40	<1	819	13
Mining & Fishing	3,428	3	2,710	5	7,596	45
Other Manufacturing	14,095	13	4,932	10	30,200	47
Construction	9,975	9	3,642	7	22,506	44
Transportation & Utilities	10,786	10	5,422	11	23,072	47
Trade	7,854	7	4,906	10	17,564	45
Health & Education	1,337	1	974	2	3,148	43
Tourist Services	5,404	5	1,633	3	11,472	47
Government & Non-profit	8,616	8	5,145	10	22,591	38
Other Services	24,536	23	13,973	28	47,687	51
Total SAL	105,490	100[2]	50,614	100[3]	227,071	
ALBERTA	227,071		111,830			

[1] See back of page 15

[2] Numbers may not total 100 due to rounding

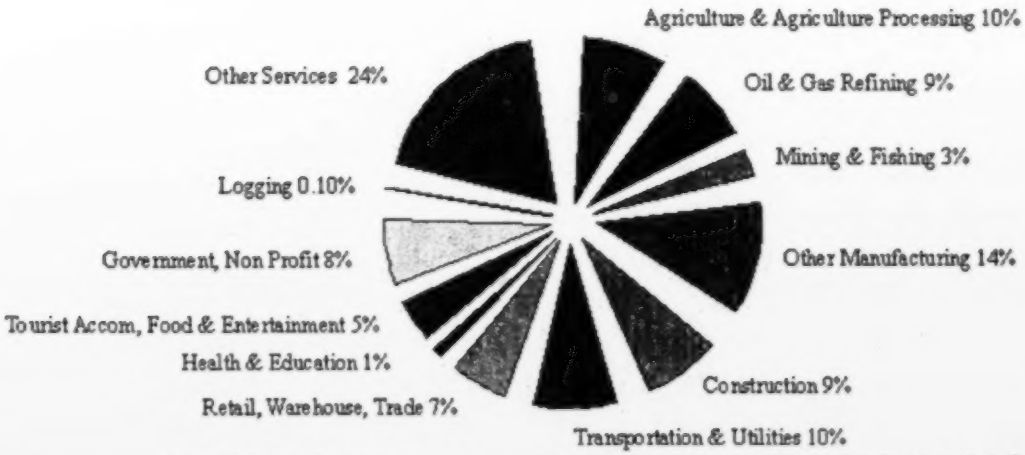
[3] Numbers may not total 100 due to rounding

Depreciation expense account for 45% of the petroleum industry sales compound to 39% for agriculture and 4% for agricultural processing since GDP include returns to capital, the GDP to sales rates in much higher for the petroleum sector than the agricultural sector.

Total sales in the SAL region accounts for 46% of total Alberta sales. GDP in the region accounts for 45% of total provincial GDP. Primary industries and their associated manufacturing represents 22% of regional sales. (Figure 1-3) Other manufacturing represents 13 % of regional sales. Sixty five percent of regional sales are in the service industry[4]. Sixty five percent of total provincial sales are also within the service industry. These service industry proportions are typical of developed economies suggesting a mature and balanced economy in the SAL region.

Figure 1-3

SASS SECTOR SALES 2001



1.4 IMPORTS AND EXPORTS

Ninety one percent of all purchases by economic sectors in Alberta, and by assumption in the SAL region, are from within Alberta sources. Trade and health and education sectors have the highest self supply ratio at 97% (Table 1-7). This means that 97% of all purchases made by these sectors are for goods supplied within Alberta. Manufacturing and construction sectors have the highest proportion of purchases outside of Alberta. Seventeen percent of these sector's purchases are for goods from outside of Alberta.

---

[4] For definition of sectors, see Section 1.2 Sectors

Table1-7

SAL Imports and Exports Outside of Alberta.

Sector	Self Supply Ratio	Proportion of Exports
Agric & Agric Processing	92	28
Oil & Gas & Refining	96	79
Logging	93	4
Mining & Fishing	96	24
Other Manufacturing	83	45
Construction	83	0
Transportation & Utilities	95	20
Trade	97	9
Health & Education	97	1
Tourist Services	92	8
Government & Non-profit	96	1
Other Services	90	2
Total SAL	91	20

The proportion of exports to other provinces and internationally compared to Alberta's total production is 20%. The service sector typically has lower export ratios with construction, Health & Education, Government, and other services exporting a very small proportion of their production to outside of the province. Petroleum products have a high export ratio at 79% of provincial production exported out of the province. In general, service industry activities are local with only 6% of its services exported from the province. Primary and manufacturing industries are more export oriented with 46% of SAL regional production exported from the province.

1.5 SUMMARY

The SAL region includes one half of Alberta's population. Two thirds of SAL's population is in CD6, which includes Calgary, Airdrie, MD of Foothills, MD of Rocky View, and Mountain View County[5]. Ninety four percent of the population in this census division is urban. The most remote census division (Hanna area) in the SAL region has a 26% urban population. Urban populations in the other census divisions in the region vary between these two extremes. This is indicative of the highly variable nature of the demographics across the SAL region. Eighty-one percent of the SAL population is urban.

[5] See appendix A

The regional diversity is also reflected in employment statistics. Eight percent of the employed population in the Calgary area is employed in primary industries while 46% of the employed population in the Hanna area is employed in primary industries. The SAL regional average employment in primary industries is 12%. Manufacturing employment in the Calgary area is 10% of those employed, 1% is employed in the Hanna area, and the SAL regional average is 9%.

The SAL region occupies about 20% of Alberta's total area but accounts for approximately 46% of Alberta's economic activity. Agriculture, petroleum/petroleum refining and manufacturing are all major drivers in the economy with each producing approximately 10% of the SAL region's sales. The service related sectors produce 65% of the region's production. The high proportion of service activity indicates a well developed economy. Regional disparities do exist however with as low as 53% of local activity happening in service type industries in the outlying areas.

Ninety one percent of the inputs used in regional production are purchased within Alberta with 9% imported from the rest of Canada or from foreign sources. Health and education services have the highest self sufficiency ratio at 97% of all inputs acquired within the region. The lowest self sufficiency ratio of 90% is in the other services sector category.

The primary and manufacturing sectors are very dependent on export markets for product sales. By comparison the SAL region service sector only exports a small proportion of its sales.

2.0 Historical Trends

2.1 POPULATION

2.1.1 General

The historical change in population, at five year intervals for the past 25 years for the province, region and Census Divisions, is shown in Tables 2-1, 2-2 and 2-3. Table 2-1 shows the actual population numbers for the 25 year period, while Table 2-2 shows the changes for the major urban centres. Table 2-3 shows the share each Census Division has had at each intercensal period, and the shift in this share over the 25 year period.

The historical comparison shows dramatic differences in intra-regional population growth, ranging from strong growth within the 'heartland' areas to a decline in the hinterland areas. The 25 year perspective on population is shown for individual Census Subdivisions/Municipalities in Appendix B.

2.1.2 Provincial and Regional Population Comparison

A comparison of the provincial and regional rates of population growth demonstrates some interesting trends, as described below:

1. The SAL regional growth has exceeded the provincial growth rate. From 1976 to 2001, the SAL region has experienced a 76.5% increase in population compared to the provincial increase of 61.8% over the same time period.

2. This increase has been consistent over time. The regional growth exceeded the provincial growth in each of the five intercensal periods.

3. Population growth at both the provincial and regional levels varies considerably by intercensal period, in parallel with the economic fortunes of the province. The highest population growth was achieved in the 1976 to 1981 intercensal period, at 23.5% for the region and 21.7% for the province. The most recent intercensal period, 1996 to 2001 is the second highest, at 13.3% for the region and 10.3% for the province. This is still half of the 1976 to 1981 population change. The three intervening five-year periods showed population growth below 10.0% for both the region and province.

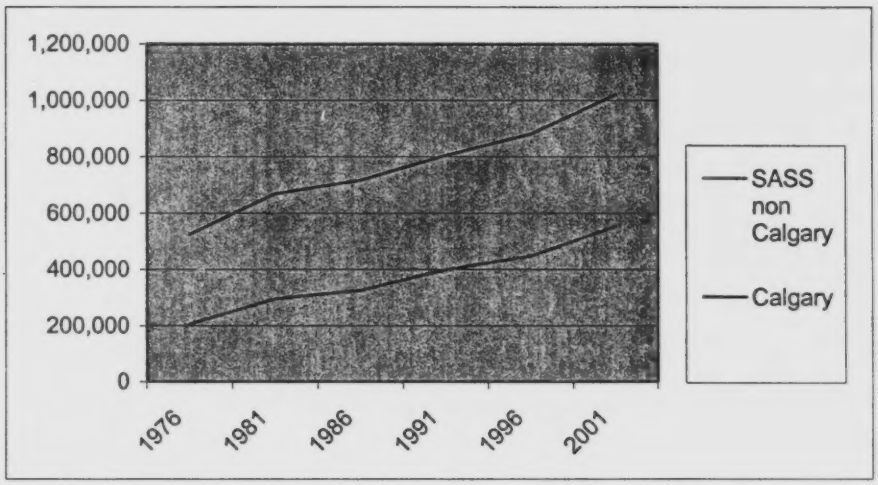
4. The SAL region has increased its share of the provincial population. The SAL share of provincial population was 45.9% in 1976; by 2001 it had increased to 50.0%, exactly half of the provincial population.

Table 2-1
Historical Population Trends

Census Division	Year						Percentage Change
	1976	1981	1986	1991	1996	2001	1976-2001
1. Medicine Hat	46,990	55,375	56,600	58,179	62,330	67,402	43.4
2. Lethbridge	97,000	110,477	115,745	119,110	125,179	133,913	38.1
3. Oldman/Waterton	32,898	35,652	36,326	36,329	37,764	37,580	14.2
4. Hanna/Oyen	12,012	11,995	12,193	11,833	11,824	11,194	-6.8
5. Drumheller/Vulcan	35,416	38,203	38,650	39,658	43,565	47,606	34.4
6. Calgary	524,544	668,682	717,100	804,802	880,859	1,021,060	94.7
7. Castor/Coronation	8,214	8,299	8,131	7,891	8,000	7,656	-6.8
8 - 11. Red Deer	71,876	94,619	104,030	110,282	117,907	132,483	87.5
15. Rocky Mountains	14,310	18,105	18,757	22,438	25,991	29,345	105.1
Totals – SAL	**843,361**	**1,041,407**	**1,107,534**	**1,210,523**	**1,313,420**	**1,488,239**	**76.5**
5 yr % change		23.5%	6.3%	9.3%	8.5%	13.3%	
Alberta	**1,838,037**	**2,237,724**	**2,365,825**	**2,545,553**	**2,696,826**	**2,974,807**	**61.8**
5 yr % change		21.7%	5.7%	7.6%	5.9%	10.3%	
Share of Provincial Population	**45.9%**	**46.5%**	**47.0%**	**47.6%**	**48.7%**	**50.0%**	

Source: Statistics Canada

Figure 2.1
SAL Region Population Growth



2.1.3 Intra-regional Trends

Not only are there great differences in populations and population densities between census divisions, rates of growth vary widely as well within the SAL region. A few observations are presented below, again with reference to Table 2-1.

1. Three of the nine census divisions, Rocky Mountains (105.1%), Calgary (95.7%), and Red Deer (87.5%) and exhibit a growth that is above the regional average. These census divisions are part of the Calgary-Red Deer corridor, with a westerly extension along the Bow corridor to include the rapidly growing communities of Cochrane and Canmore.

2. Two of the census divisions, Hanna/Oyen (-6.8%) and Castor/Coronation (-6.8%) show negative growth. These are predominantly agricultural census divisions occupying the northeastern portion of the region, comprising only 1.3% of the SAL population. These are areas of low population density and a low level of urbanization.

3. The remaining four census divisions have experienced positive growths that are lower than the regional average. The Medicine Hat (43.4%) and Lethbridge (38.1%) Census Divisions are each influenced by central urban places which have seen steady, sustained population growth.

The Drumheller/Vulcan (34.4%) Census Divisional population is influenced by proximity to Calgary, as it contains Wheatland County and the Town of Strathmore, which are both experiencing the spillover effects of Calgary's growth.

2.1.4 Major Urban Cities

The growth rates of the four major urban centres with populations over 50,000 are shown in Table 2-2. All have shown strong positive growth, with Red Deer more than doubling its population and Calgary increasing by 87.0%.

Table 2-2

Historical Population Trends Cities

Urban Centre	Year						Percentage Change 1976-2001
	1976	1981	1986	1991	1996	2001	
Calgary	469,917	592,743	636,105	710,795	768,082	878,866	87.0%
Red Deer	32,174	46,393	54,425	58,145	60,075	67,707	110.4%
Lethbridge	46,752	54,072	58,840	60,974	63,053	67,374	38.1%
Medicine Hat	32,811	40,380	41,805	43,625	46,783	51,249	56.2%
Airdrie	32,811	40,380	41,805	43,625	46,783	51,249	56.2%

Urban centres surrounding Calgary and Red Deer have shown especially dynamic population growth as they have captured spillover growth from the major urban centres. The figures for individual municipalities shown in Appendix A demonstrate the extraordinary rates of growth experienced by a number of mid-sized urban communities. Airdrie, for example, experienced a thirteen-fold increase in its population between 1976 and 2001, growing from 1,408 to 20,382. Similarly, Cochrane grew from 1,450 to 11,798 in the same period, an increase of a factor of seven. Other examples are Okotoks, whose population expanded by a factor of 5.5, Canmore by a factor of 4.6, Strathmore by a factor of 3.9 and Sylvan Lake by a factor of 3.1.

2.1.5 Intra-Regional Shifts in Population Share

Table 2-3 illustrates the historical shift in the share of regional population for each of the Census Divisions.

Three Census Divisions, namely the Calgary, Red Deer and Rocky Mountains Census Divisions have experienced both a substantial increase in population and an increase in the regional share of the population.

The shift in the share of regional population is most pronounced in the case of the Calgary Census Division, which has increased its share of regional population from 62.2% in 1976 to 68.6% in 2001. The Red Deer and Rocky Mountains Census Divisions have also gained share, but to a lesser extent.

Four Census Divisions, Medicine Hat, Lethbridge, Drumheller/Vulcan and Oldman/Waterton have experienced population increase over time, but their share of the regional population has declined, due to the relatively rapid population growth in the three fastest growing Census Divisions, especially Calgary.

The two north-eastern Census Divisions, Castor/ Coronation and Hanna/Oyen have experienced both a declining population and a considerable loss in the share of the regional population. Their joint share of the regional population has dropped from 2.4% in 1976 to 1.3% in 2001.

Table 2-3

Historical Shift in Regional Share by Census Division

Percent of Regional Population

	Census Division	1976	1981	1986	1991	1996	2001
1.	Medicine Hat	5.6	5.3	5.1	4.8	4.7	4.5
2.	Lethbridge	11.5	10.6	10.4	9.8	9.5	9.0
3.	Oldman/Waterton	3.9	3.4	3.3	3.0	2.9	2.5
4.	Hanna/Oyen	1.4	1.2	1.1	1.0	0.9	0.8
5.	Drumheller/Vulcan	4.2	3.7	3.5	3.3	3.3	3.2
6.	Calgary Region	62.2	64.2	64.8	66.5	67.1	68.6
7.	Castor/Coronation	1.0	0.8	0.7	0.7	0.6	0.5
8 - 11.	Red Deer	8.5	9.0	9.3	9.1	8.9	8.9
15.	Rocky Mountains	1.7	1.7	1.7	1.9	2.0	2.0

Source: Statistics Canada/UMA

To conclude, the analyses illustrate the increasing concentration of population in the Calgary, Red Deer, Rocky Mountain corridor and the decreasing proportion of population in rural areas.

2.1.6 Components of Population Change

Population change is due to two factors:

- The difference between births and deaths, known as natural increase or decrease; and
- Net migration, the difference between immigration and emigration.

The previous discussion has shown that some Census Divisions are growing rapidly, others very little. Is growth in the region due to natural increase or migration? A brief look at the factors affecting population change may provide at least a partial answer to this question.

Crude birth rates (births per 1,000 population) in Canada have been declining, from 11.2/1000 in 1998 to 10.5 in 2003. During the same time period, death rates have been nearly constant, at 7.2/1000, resulting in a rate of natural increase of 3.3/1000 or .33 per cent.

Alberta, due to a younger population, has slightly higher birth rates and slightly lower death rates. In 2003, the birth rate was 12.2/1000, somewhat higher than Canada's. Nevertheless, it had decreased from 13.0 in 1998. The death rate has increased slightly from 5.8/1000 in 1998 to 6.0/1000 in 2003. As a result, the rate of natural increase is 6.2/1000 or .62 per cent.

These figures can be applied to the population of Calgary, the major population centre in the SAL region, to identify the relative influence of the factor affecting population change.

The population of the Calgary Census Metropolitan Area (CMA) has surpassed the one million mark. The average annual rate of growth over the past few years has been just below 25,000 persons per year, varying somewhat from year to year. Assuming rates of natural increase are similar in the Calgary CMA to the province, (and they likely are a little higher), then the annual natural increase would be 6,200 people, that is .62 per cent of one million. The rest of the population increase or 18,800 people would then be due to immigration.

More simply put, for each additional 100 people in the Calgary CMA, 25 are the result of natural increase and 75 the result of immigration, or more accurately, net in-migration.

Immigration will continue to play a strong part in sustaining populations and population growth in the future, as the population ages and as birth and death rates converge. However, mobility is age selective; the young are more likely to migrate. Thus immigration may continue to slow down the aging of the population.

Immigration to the Calgary CMA is of regional, provincial, national and international origin. To identify the areas of origin is beyond the scope of this report. Further analysis applied to the other Census Divisions would identify those which are experiencing net in- or out-migration.

Table 2-4

Employment Change by Economic Sector 1981 to 1996: Census Divisions 1-6 and 8

Sector	Employment 1981	%	Employment 1986	%	Employment 1991	%	Employment 1996	%	% Change 1981 - 1996
Primary	82,710	14	85,465	14	88,260	13	81,740	12	-1.2
Manufacturing	51,170	9	49,030	8	52,080	8	60,555	9	15.5
Construction	62,605	11	40,115	7	46,470	7	48,560	7	-28.9
Transportation & Communication	44,885	8	46,405	8	53,235	8	56,490	8	20.5
Trade	97,325	17	100,425	17	112,670	17	123,081	18	20.9
FIRE*	33,695	6	32,685	5	36,610	5	36,015	5	6.4
Services	198,255	35	241,940	41	279,970	42	287,515	41	31.0
TOTAL	**570,645**	100	**596,065**	100	**669,295**	100	**693,956**	100	**17.8**

* Finance, Insurance and Real Estate

1. Primary Industry
2. Manufacturing Industries
3. Construction Industries
4. Transportation, Communication & Utilities (1981)
   Transportation, Storage, Communications & Utilities (1986)
   Transportation and Storage Industries (1991 & 1996)
   Communications and Utility Industries (1991 & 1996)
5. Trade Industries
   Wholesale & Retail Trade Industries (1996)
6. Financial, Insurance, Real Estate Industries
7. Public Administration and Defence (1981)
   Government Services Industries (1986, 91, 96)
   Community, Business and Personal Services (1981)
   Business Service Industries (1996)
   Health & Social Service Industries (1991 & 1996)
   Education Service Industries (1991 & 1996)
   Accommodation, Food & Beverage Industries (1996)
   Other Service Industries (1986 & 1996)
   Other Industries (1991)

2.2 ECONOMIC SECTORS

The historical shift in economic sectors for the seven Census Divisions that approximate the region is shown in Table 2-4. The data are shown for five-year periods for 1981-1996, due to availability and comparability of sources. Several observations warrant consideration.

1. Three sectors, services, trade and transportation/communication have experienced growth greater than the regional average. The service sector has increased its share from 35 to 41 per cent of total employment, with a 31.0 per cent increase in employment. The trade and transportation/communication have seen substantial growth, in the range of 20 per cent, slightly above regional growth, but have maintained stability in their share of total employment.

2. The manufacturing sector has experienced employment growth slightly below the regional average and has maintained a stable share of total employment. The finance, insurance and real estate sector has experienced modest growth of 6.4 per cent and a slight decrease in regional share.

3. The primary and construction sectors have experienced both a decline in employment between 1981 and 1996 and a decline in the proportional share of each sector's employment. Construction experienced a decrease of 28.9 per cent in total employment and a decrease in share of total employment from 11 to 7 per cent.

HISTORICALLY, THE EMPLOYMENT DATA SHOW A SHIFT IN THE ECONOMIC STRUCTURE OF THE REGION AWAY FROM THE PRIMARY SECTOR INTO THE TERTIARY, ESPECIALLY THE SERVICE SECTOR.

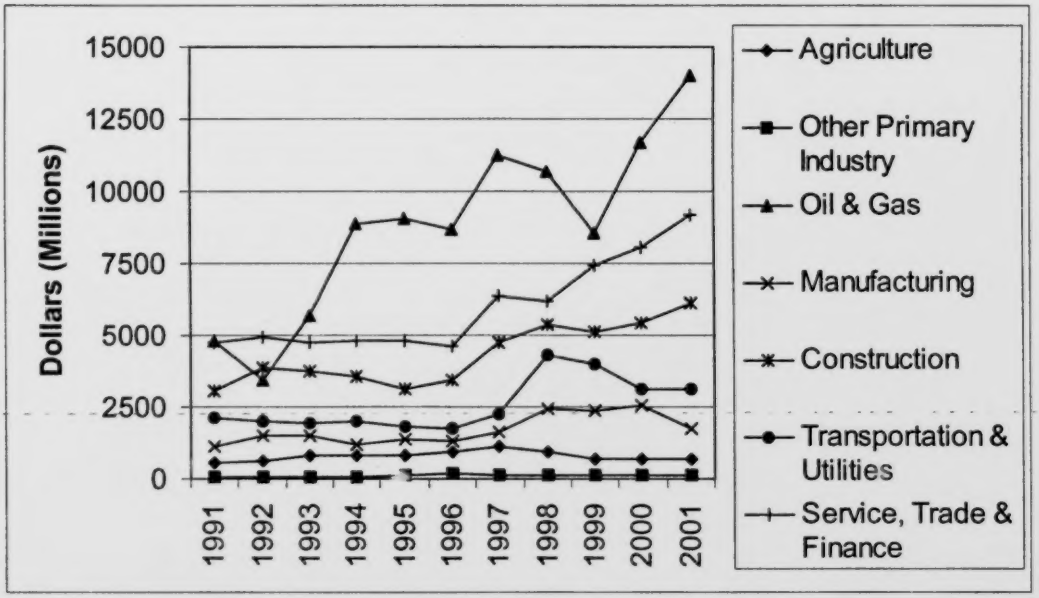
2.3 Capital Infrastructure

Capital infrastructure investment includes investments in durable goods such as equipment, infrastructure and buildings by both private and public interests. In 2001 $41 billion was invested in the province (See Appendix C). Approximately $6 billion of the $41 billion was invested in the oil sands outside of the SAL region. If the investment for each sector across the province is proportional to the sector's sales, and excluding the oil sands, $15 billion was invested in the SAL region in 2001. Total provincial investments have increased from approximately $17 billion in the early 1990's to the current $41 billion. (Figure 2.2)

Figure 2.2

Alberta Investment Profile

(Excluding Oil Sands)



Non-primary sector investments for the early to mid 1990's were generally flat with some increased investment activity beginning in 1996. The manufacturing sector has declined in the last few years but overall has increased in the late 1990's as compared to the earlier part of the decade. Investments in the construction and service industries have realized significant increases during the last 7 years, even though employment is down 29% It is interesting to note that investment activities appear to accelerate and decline in two year cycles.

This is particularly true in the oil and gas industry. Investments in the oil and gas sector have continued to dramatically increase even when the tar sands activities are excluded. As petroleum prices increase and reserves become less accessible, it is expected that the investment cost of procurement will continue to increase in the SAL region.

Investments in Alberta relative to dollar of sales for the years 1999, 2000, and 2001 surpassed annual investments for the Canadian economy

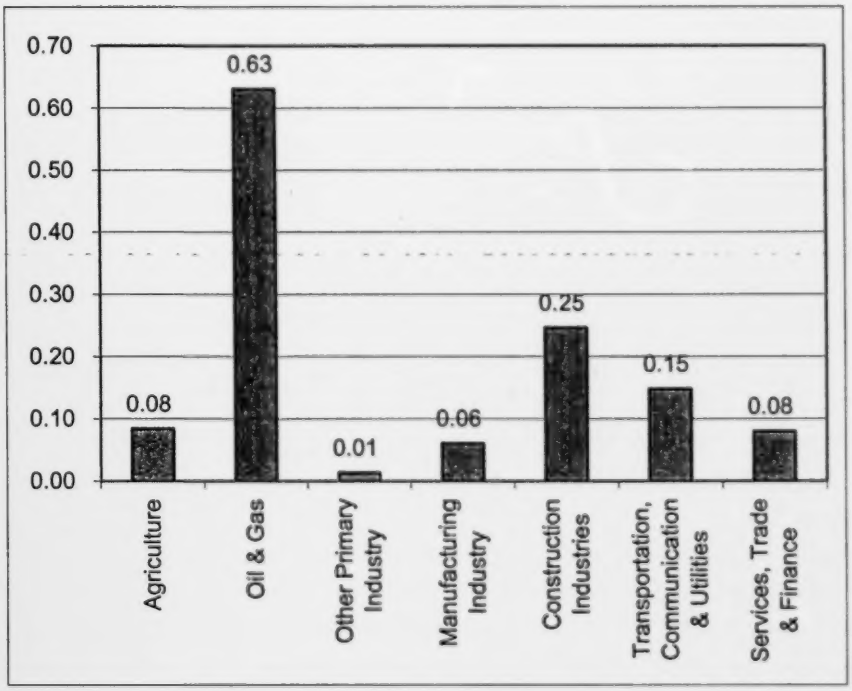
The construction industry reinvests 25 cents for every dollar of sales. The rates of reinvestment in Alberta as compared to Canadian rates of reinvestment suggest that the Alberta economy and thus the SAL regional economy will continue to out perform the Canadian economy for some time into the future.

Figure 2.3

Alberta Sector Reinvestment Rate

As a Proportion of Sales

(1999-2001 Average)



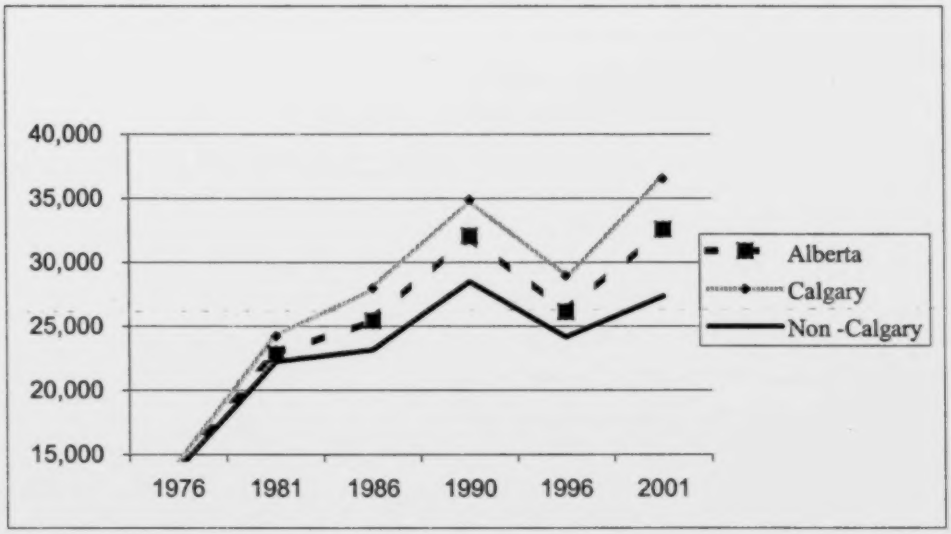
2.4 Personal Income

Personal income (income per tax return) in Alberta has followed the Canadian average trend. In general, Alberta's income has exceeded the Canadian income over the last 30 years.

Average income in the SAL region has exceeded the Alberta average from 1977 to 2001. The predominance of Calgary and the immediate surrounding area (Census Division 6) in the SAL region is demonstrated by the average income in Calgary consistently above the Alberta average while the rest of the SAL region is consistently below the Alberta average. (Figure 2-4). Initially incomes within the SAL region were consistent with provincial incomes but as minor recessions occurred in the early 1980's and mid 1990's the Calgary region's recovery was quicker than the rest of the SAL region. Incomes within the SAL region appear to continue to diverge.

Figure 2-4

SAL Region Average Income Per Tax Return



Non-Calgary census division 2.3 in 1976. Average income per tax return has even started to decline in some rural areas within the SAL region.

2.4.1 CURRENT INCOME AND POPULATION GROWTH

The 1996 to 2001 time period demonstrates a direct relationship between income and population growth. The areas within the region with higher incomes also have the highest population growth rates. The areas with lower than average incomes also have lower than average population growth rates. (Figure 2-5)

2.5 SUMMARY HISTORICAL TRENDS

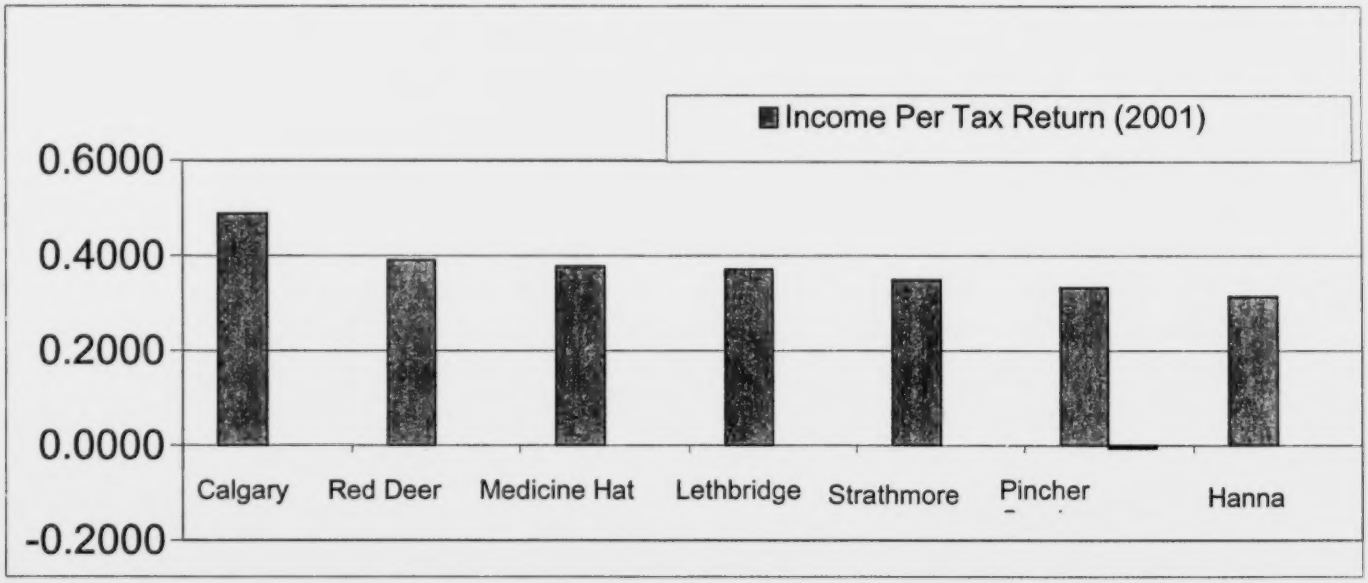
Population in the SAL region is growing faster than the provincial and the national population. The proportion of the Alberta population in the SAL region has grown from 46 to 50% of the total provincial population over the last decade. The SAL region's growth has been consistent and has exceeded provincial growth in each of the last five inter-census periods.

Population growth however is not consistent within the region. There is a marked population shift within the region to the Calgary area and extending from Calgary into the Calgary Red Deer corridor and into the Calgary mountain corridors. Outside of the Calgary corridors, regional population growth has fallen behind provincial average growth. One census division (Hanna/Oyen area) has experienced a negative growth rate and one census division (Pincher Creek /Oldman) in the SAL region has experienced no recent growth. Thus Calgary's share of the SAL region's population has increased from 62% in 1976 to 68% in 2001.

Coincidental with the shift in population into the Calgary corridor regions has been a shift from employment in primary industries into service oriented employment.

In 1976, regional incomes including those in the Calgary census division were consistent with provincial average incomes. Since 1976, growth in per capita incomes in the Calgary region have exceeded Alberta's per capita income incomes while the non Calgary SAL area has dropped behind provincial income growth rates. The divergence in incomes between areas within the region appears to be widening.

Figure 2-5
Comparison of Income To Population Change



3.0 Quality of Life Indicators

3.1 INCOMES

3.1.1 Provincial and National Perspective

Alberta led all provinces and territories in the growth in median family incomes between 1990 and 2000, according to Statistics Canada data for the 2001 census.

Nationally, median family incomes rose 0.8% in the ten-year period from $54,560 to $55,016, in constant dollars. In Alberta, by contrast, median family incomes rose by 7.1% from $56,140 to $60,142. Only three other provinces, Saskatchewan (5.1%), Manitoba (3.0%) and Prince Edward Island (2.1%) exceeded the national rate of growth of median family income, while six provinces or territories experienced a decline in this median family income.

Alberta's 2000 median family income $60,142 was substantially higher than the national median of $55,015 and was exceeded by only one province, Ontario, with a median family income of $61,024.

Among the 27 Census Metropolitan Areas (CMAs) in Canada, Calgary ranked fourth in 2000 with a median family income of $65,488. This is considerably greater than both the Alberta and Canada median family incomes of $60,142 and $55,016 respectively. Calgary's median family income is exceeded only by Ottawa-Hull. The Edmonton median family income for 2000 was $60,817, slightly higher than the provincial median, with a ten-year increase of 4.4 per cent.

The Calgary CMA's rate of increase in median family income was 6.6 per cent from 1990 to 2000, the second highest of the 27 CMAs, being exceeded only by Windsor at 13.3 per cent. This concentration of high median incomes may reflect the greater opportunities in higher paying sectors such as petrochemical industries and financial and professional services. It may also reflect the inflationary effect of competition for employees in fast growing centres. In addition, the emerging role of Calgary as a centre for head-offices in western Canada, would influence incomes positively. Finally, incomes in more rural areas likely reflect lower incomes characteristic of the agricultural and related service sectors.

3.1.2 Regional Perspective

Considerable disparity in median family incomes is evident within the SAL region. As shown in Table 3-1, the Calgary census divisions (CD6) have a median family income of $65,101. substantially greater than the provincial median.[6] CMA's statistics are not available throughout the SAL region and thus CD statistics are also used herein.

All other census divisions within SAL are lower than the provincial median. The Red Deer and Rocky Mountain census divisions are lower than the provincial but higher than the national median. The remainder are below the nation median. The lowest median family income is the Oldman/Waterton census division in the southwest with a median of $45,036. This sub region is more than half rural in population.

A disparity in median incomes is clearly evident with the higher incomes concentrated in the highly urbanized areas of the Calgary-Red Deer and the Calgary-Banff corridor.

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[6] (It should be noted that Calgary CMA is a sub component of CD6.)

Table 3-1

Median Family Income (2000)

SAL Region - Census Divisions 1- 6, 8 and 15

Census Division/Subregion	Median Family Income All earners – 2000
6. Calgary	$65,105
8. Red Deer	$56,178
15 Rocky Mountains	$56,170
1. Medicine Hat	$53,794
2. Lethbridge / Brooks	$53,108
4. Hanna / Oyen	$51,671
5. Drumheller / Vulcan	$50,032
3. Oldman / Waterton	$45,036
Alberta	**$60,142**
Canada	**$55,106**

A further breakdown of median family income by municipalities over 5000 within the region further illustrates this distribution (Table 3-2). The bolded upper line in Table 3-2 indicates the provincial median family income of $60,142. The lower bolded line in Table 3-2 indicates the Canadian median family income of $55,106.

Of the eight municipalities with a median family income over the provincial median, seven are near the City of Calgary in addition to Calgary itself. The eighth is Sylvan Lake, a satellite of Red Deer.

There appears to be a rough correlation of median family income and greater distance from Calgary, although there are several exceptions to this generalization.

The more detailed municipal analysis shows that the highest and lowest median family incomes within municipalities listed vary by a factor of 1.8, from $47,450 to $86,097. There is insufficient data available to this study to determine whether this variance is offset by a similar variance in the cost of living.

Table 3-2
Median Family Income - 2000
SAL Region – Census Subdivisions over 5,000 Population

Census Subdivision	Census Division	Median Family Income All earners - 2000
Rocky View MD	6	$86,097
Foothills MD	6	$74,493
Town of Okotoks	6	$72,993
Town of Cochrane	6	$72,599
City of Airdrie	6	$69,535
Town of Canmore	15	$64,890
City of Calgary	6	$64,603
Town of Sylvan Lake	8	$60,774
Town of Strathmore	6	$59,705
City of Red Deer	8	$59,152
Town of Brooks	2	$59,141
Red Deer County	8	$58,583
Cypress County	1	$58,104
Newell County	2	$57,293
Town of Banff	15	$56,618
Town of High River	6	$56,085
Town of Drumheller	5	$55,429
Wheatland County	5	$55,101
Mountain View County	6	$55,096
Lethbridge County	2	$53,707
Town of Taber	2	$53,470
City of Lethbridge	2	$53,145
Town of Innisfail	8	$53,132
Town of Olds	6	$52,927
City of Medicine Hat	1	$52,910
Town of Coaldale	2	$52,660
Willow Creek MD	3	$50,916
Town of Taber	2	$50,494
Kneehill County	5	$48,417
Town of Crowsnest Pass	15	$47,450
Alberta		**$60,142**
Canada		**$55,106**

3.2 Distribution of Educational, Health and Government Employment

The analysis was undertaken to gain insight as to whether the provision of services, especially in the education, health and government administration areas, is equally distributed throughout the region. In addition, the data allow comparisons with comparable provincial ratios. Attention was given to the sparsely populated, more rural and remote portions of the region.

Table 3-3

Government, Education and Social Services Employment as Percentage of Total Employment (1996)

Census Divisions 1- 8 and 15

	Government Services		Education Services		Health & Social Services				
Census Division	No.	%	No.	%	No.	%	TOTAL	Total Employment	% Total Employment
1	1,855	5.6	1,930	5.9	3,270	9.9	7,055	32,900	21.4
2	3,220	4.9	5,130	7.9	6,380	9.8	14,730	65,250	22.6
3	1,085	6.1	1,310	7.3	2,040	11.4	4,435	17,825	24.9
4	200	3.0	400	5.9	520	7.7	1,120	6,770	16.5
5	1,405	6.4	1,480	6.7	1,685	7.7	4,570	21,940	20.8
6	19,100	3.8	30,050	6.0	41,105	8.3	90,255	497,170	18.2
7	1,235	5.6	1,115	5.0	1,755	7.9	4,105	22,195	18.5
8	2,935	4.1	4,490	6.3	8,020	11.2	15,445	71,725	21.5
15	1,385	7.3	895	4.7	1,185	6.2	3,465	18,990	18.2
Region	32,420	4.3	46,800	6.2	65,960	8.7	145,180	754,765	19.2
Province	75,410	5.1	97,535	6.6	132,610	8.9	305,555	1,486,980	20.5

The proportion of services in the SAL region is slightly less than the provincial in all three-service categories. The under-representation of the government employment in the region is not surprising, given the location of the provincial capital in Edmonton, outside the SAL region.

The slight under-representation of employment in education services may be attributable to the relative scale of post-secondary institutions in the rest of the province, particularly in the capital region. Percentage employment in health and social services in the SAL region may be due, in part, to the concentration of medical teaching and research facilities associated with the University of

Alberta in the capital region. The function of Edmonton in providing health and medical services to a large northern region, including the Northwest Territories, may also account for disparity.

Within the region, above average employment in the three service sectors is evident in the Oldman/Waterton (CD3), Lethbridge/Brooks (CD2), Red Deer (CD8) and Medicine Hat (CD1) census divisions, as indicated by bold line in Table 3-4. The lowest is found in the Hanna/Oyen (CD4) census division, which is also the most rural, and the Calgary (CD6) census division that has by far the largest population.

A related indicator is the ratio of health and educational service employment to census division population. Employment is a measure of the activity level in these services and is used as a surrogate measure of access to health and educational services. These values were derived for each Census Division and are shown in Table 3-4 in descending order of total health and education employment.

Table 3-4
Health Care and Education Employment Per 1,000 Population for SAL and Province - 1996

Census Division	Health Care Employment per 1000 Population	Education Employment per 1000 Population	Health and Education Employment per 1000 Population
8. Red Deer	60.0	33.6	93.6
2. Lethbridge/Brooks	51.0	41.0	91.9
3. Oldman/Waterton	54.0	34.7	88.7
1. Medicine Hat	52.5	31.0	83.5
6. Calgary	46.7	34.1	80.8
4. Hanna/Oyen	43.2	33.2	76.4
5. Drumheller/Vulcan	38.7	34.0	72.7
7. Castor/Stettler	42.6	27.1	69.7
15. Rocky Mountains	38.5	29.1	67.6
Region	48.2	34.2	82.4
Province	49.2	36.2	85.4

Overall, the SAL region is slightly under-represented in health care and education employment relative to the province.

There is considerable variation between census divisions. However, it is uncertain whether the variations can be attributed to the degree of urbanization, population density or rate of population growth of each census division. It does appear that three of four census divisions with the lowest relative number of health care and education workers are less urbanized, have no large urban centre, and lack large post-secondary institutions. However, more detailed analysis would be required to determine whether access to health care and education varies significantly within the region.

3.3 Population Dynamics by Age

3.3.1 National Perspective

The population of Canada is aging. In the inter-censal period from 1996 to 2001, the median age of Canada's population increased from 35.3 years to 37.6 years. Statistics Canada notes that this is the biggest census to census increase in a century and that the median age at the end of the baby boom in 1966 was 25.4 years.

The increase in the median age is attributable to the decline in the number of births since 1991 and the large 'baby-boom' cohort now into the 45 to 64 age bracket.

The aging of the population is evident with respect to several specific age brackets:

- The number of children under the age of four declined by 11.0 per cent between 1991 and 2002, in response to declining fertility rates since 1966, the end of the baby boom;
- The population aged 19 and under declined from 28 per cent of the population in 1991 to 26 per cent in 2001;
- The population aged 45 to 64 increased 36 per cent between 1991 and 2001 due to the entry of baby boomers into this age bracket;
- The population aged 65 and over more than doubled between 1966 and 2001 and now comprises 13 per cent of the nation's population; and
- The over-80 population is the fastest growing segment of the population, having increased by more than 40 per cent between 1991 and 2001 and predicted to increase an additional number by 2011.

These changes in the age structure of the population will effect the labour force, the economy, education and health services, housing needs, market trends and many other aspects of the nation's social and economic fabric.

3.3.2 PROVINCIAL PERSPECTIVE

Alberta is the youngest province in Canada. While the same factors that apply nationally are evident provincially, Alberta's median age is 35.0 years, compared to 37.6 years for Canada and 38.8 years for the oldest provinces, Nova Scotia and Quebec.

Alberta has experienced a decline in youthful population as a proportion of its total population. The number of pre-school children declined by 10 per cent from 1991 to 2001, while the young working-age population between ages 25 to 34 declined by 12 per cent. Still, the under-19 age group is 28 per cent of the provincial population compared to 26 per cent nationally.

However, Alberta's relatively youthful population as compared to other provinces may be attributed to strong population growth due to in-migration that generally involves the younger, economically active segment of the population.

In 2001, the seniors' age group of 65 and older comprised only 10 per cent of the Alberta population compared to 13 per cent for Canada.

The urban centres within the Calgary-Edmonton corridor are slightly younger than the rest of the province in terms of median age. The two metropolitan areas are also some of the youngest in Canada. The Calgary CMA has a median age of 34.9 years, compared to 35.0 for the province. This is second youngest metropolitan area in Canada.

The median age for rural and small town areas for Alberta is 35.3, slightly above the provincial median of 35.0. The median for rural and small town areas is the lowest of any of the provinces.

3.3.3 REGIONAL PERSPECTIVE

Rapidly growing centres tend to have more youthful populations, reflecting the propensity of in-migrates to be young. Calgary, with a median age of 34.8 years and Red Deer, with a median age of 33.1 years, is below the provincial median of 35.0 years. Some of the nearby smaller urban centres also are even younger, as they may attract younger families because of more affordable housing or other factors. The median age for Okotoks is 32.3 years, for Airdrie is 31.9 years and for Sylvan Lake is 31.6 years. Banff, with a median age of 29.4 is young, influenced by the age of people involved in the tourism sector. Similarly Brooks, with a median age of 30.0 and Taber with a median age of 28.3, are examples of urban centres that attract younger people to work in oilfield service, agricultural service or meat packing industries.

Other urban centres with lower rates of growth have higher median ages. They may be experiencing greater out-migration of young people and greater in-migration of older people. They may function as retirement destinations on a local or regional scale. Lethbridge at 36.7, Medicine Hat at 37.7, Drumheller at 38.4, Hanna at 39.0 and Pincher Creek at 40.1, all are above the provincial median of 35.0 and are typical of an older age pattern.

Rural municipalities tend to have younger populations as well, reflecting generational change in the agricultural industry and relocation of older farm people into nearby urban centres. Lethbridge County, for example, has a median age of 28.4, compared to Lethbridge City with 36.7.

Finally, aboriginal communities are much younger than other communities. The median age for aboriginal people in all of Alberta is 23.4, compared to the provincial median of 35.0. Median ages for the five First Nations in the SAL region are comparable to the median age for aboriginal people in Alberta, and thus much lower than the provincial median age. Clearly, the demographic patterns for aboriginal populations present a strong contrast to those of the rest of the regional population.

3.4 Population to Employment Ratios

The ratio of population to employment was investigated for two reasons:

1. to provide the basis for predictions of future population based on employment predictions. Once employment requirements are estimated by the I-O Model, associated population estimates can be determined.

2. to determine whether there are significant differences in space and time in these basic relationships. Does the population to employment ratio change over time and does the employment to population ratio change throughout the SAL region.

The above information is relevant to the prediction of future population associated with future employment requirements as the various economic sectors increase (decrease) for various future scenarios. The population to employment ratios are shown in Table 3-5. The reciprocal of the P/E ratio would be the dependency ratios. To illustrate, a P/E ratio of 1.80 means that for a given area, the population would be 18,000 with an employed population of 10,000. Each person working supports .8 people not working for reasons of age or other reasons. Conversely, the percentage of people in the work force would be 10,000 out of 18,000 or 55.5 per cent.

The analysis includes the Census Divisions that are more than 10 per cent within the region.

Table 3-5

Population to Employment Ratio for

Complete Census Divisions 1 – 8, and 15

Census Division	1981			1986			1991			1996		
	Pop.	Emp.	P/E Ratio	Pop.	Emp.	P/E Ratio	Pop.	Emp.	P/E Ratio	Pop.	Emp.	P/E Ratio
1. Medicine Hat	55,375	27,235	2.03	56,590	28,180	2.01	58,179	29,980	1.94	62,330	32,350	1.93
2. Lethbridge	110,477	54,810	2.02	115,735	57,765	2.00	119,110	61,605	1.93	125,179	65,250	1.92
3. Pincher Creek	35,652	15,295	2.33	34,970	15,330	2.28	36,329	16,730	2.17	37,764	17,825	2.12
4. Hanna/Youngstown	12,119	5,960	2.03	12,380	6,395	1.94	11,947	6,575	1.82	12,046	6,770	1.78
5. Drumheller/Vulcan	38,382	17,730	2.16	38,805	19,010	2.04	39,658	20,545	1.93	43,565	21,940	1.99
6. Calgary Region	668,682	386,320	1.73	715,605	408,105	1.75	804,802	464,825	1.73	880,859	497,170	1.77
7. Castor/Stettler	40,071	18,815	2.13	40,680	20,650	1.97	39,694	21,365	1.86	41,169	22,195	1.85
8. Red Deer	123,642	63,360	1.95	116,610	61,285	1.90	124,098	66,790	1.86	133,592	71,725	1.86
15. Rocky Mountains				22,795	14,435	1.58	26,539	15,925	1.67	30,800	18,990	1.62
TOTALS	1,084,400	589,525	1.84	1,154,170	631,155	1.83	1,260,356	704,440	1.79	1,367,304	754,215	1.81

Several trends are worth noting.

1. The ratio of population to employment in SAL has declined over time, however the Calgary (CD 6) has increased for 1.73 in 1981 to 1.77 in 1996. The regional ratio declined from 1.84 to 1.81 this again reflects the predominance of Calgary (CD 6) in the SAL region.

2.2 Spatially, the areas of lowest population to employment ratio (highest percentage of work force in the population) are those Census Divisions that have young, growing populations. Both the Calgary (CD 6) and Rocky Mountain (CD15) Census Divisions are typical of this pattern, with P/E ratios of 1.62 and 1.77 respectively. The Hanna/Oyen Census Division with a P/E ratio of 1.78. This is an area of low population, slow growth and a predominantly rural population. It appears that more of an agricultural family household is involved in farm activities and thus a higher proportion of the population is employed as compared to urban areas. Other Census Divisions show P/E ratios that are substantially greater than the regional ratio. Because the Calgary Census Division dominates the population and economic activity, a blended ratio between the regional and Calgary Census Divisional ratios may be appropriate for predictive purposes.

Future scenarios of population to employment ratios may indicate a higher proportion of the population reporting some employment (higher ratio). Alternatively the ratio may start to decline in the future as the population ages and fewer seniors report employment.

3.5 Educational Attainment

Educational attainment may be a significant factor influencing the ability of the region or a Census Division to move into the secondary or tertiary sectors of the economy. Educational attainment may also be related to income levels or to the degree of urbanization of the region or its Census Divisions.

A preliminary analysis was undertaken to explore these potential relationships. The analysis used a simple indicator, namely the percentage of population with a university certificate, diploma or degree. The analysis included all Census Divisions, which have more than 80 per cent of their population within the SAL region.

The results of the analysis are shown below, in descending order of percentage of university completion.

Census Division	Percentage of Population With University Completion
CD 6 – Calgary	26.6%
CD 15 – Rocky Mountains	21.3%
Province	**20.2%**
CD 2 – Lethbridge/Brooks	15.0%
CD 8 – Red Deer	12.4%
CD 3 – Oldman/Waterton	12.2%
CD 1 – Medicine Hat	11.3%
CD 5 - Drumheller/Vulcan	11.0%
CD 4 - Hanna/Oyen	9.3%

Source: Statistics Canada, 2001

Only two Census Divisions are above the provincial percentage in terms of university education – Calgary and the Rocky Mountains.

Higher levels of educational appear to be associated with the following factors:

- Lower reliance on primary production, conversely, greater representation of the business services sector;
- Higher levels of urbanization;
- Access to university or to university entry programs; and
- A more rapid rate of population growth, with associated mobility factors.

3.6 Summary

Family income and available services including government, medical and educational services were used as measures of quality of life in the region.

Provincial median family income for the 2001 census at $60,142 is substantially higher than the national median income of $55,015. Median incomes for census divisions within the SAL region, varies from above the Alberta median income too less than the Canadian median. The Calgary census division has the highest median income of $65,000. The Red Deer census division has lower than the provincial average but higher than the national average median income. All other census division in the SAL region have lower incomes than the national median family income. The Waterton/Oldman census division has the lowest family median income in the SAL region of $45,000.

Calgary census division has the majority of the regional population and so the majority of the region's population have high median family incomes. However family incomes in most of the rest of the SAL region fall behind regional, provincial and national norms.

The SAL region appears to be under-represented in government, education, and health and social services. There is considerable variation these three service sectors between sub regions. The less urbanized regions tend to have lower proportions of services as compared to more urbanized centres. The Calgary sub region has the highest density of quality of life services.

Age trends are sometimes used as an indicator of quality of life. The younger workforce tends to move to areas of greatest economic opportunities such as urban centres while the older population is settled and tends to remain. Or alternatively, the older retired population chooses to move to areas that have the best living conditions and quality of life services. No significant trends were detected within the SAL region.

Population to employment ratios varied across the region from 1 in every 1.62 people in the mountain region reporting full or part time employment to 1 in every 2.12 people reporting some employment. Higher population to employment ratios (higher dependency ratios) occurred in the more rural areas and the highest portion of employment was in the mountain region and in urban centres. The SAL regional average population to employment ratio was 1.81. This statistic appears to be stable through the SAL region especially given the increase in urban populations is compared to rural populations. The statistics also appear to be stable over time and can be considered a basic statistic for future scenario analysis.

4.0 Alberta Government Economic Initiatives

Government initiatives can be very effective in generating economic development. The following is a review of various departmental initiatives by the Alberta Provincial government to foster economic development in the province. The government is multi-faceted with many types and sub types of initiatives. The criterion utilized herein is the magnitude of financial resources allocated to government programs and not necessarily the efficacy of the programs.

Often government initiatives focus on economic development for the entire province other than specific regions such as the SAL region. Government departments were contacted to determine the magnitude of investment or focus in the SAL region and to solicit departmental objectives and strategies regarding economic initiatives.

One predominant philosophy that became apparent through departmental contacts is the Government of Alberta has put in place a policy to "Stay out of the business of being in business". Instead of undertaking specific traditional economic development projects it has concentrated on developing a friendly to business environment.

Promotional material demonstrates that over the past decade, Alberta's economy has shown tremendous growth, outperforming both the national and US economies. Between 1992 and 2002, the province's gross domestic product alone grew by more than 50 per cent. Increases were also posted in the areas of employment (growth of more than 30 per cent) and population (growth of more than 19 per cent), while exports expanded by nearly 175 per cent and investments grew by more than 148 per cent. The Alberta government has built on this by engineering an economic plan that ensures a positive business climate exists in the province. A climate that encourages investment, creates diversity, and empowers Alberta businesses to compete successfully around the globe. The result is one of the world's most vibrant and competitive economies with the lowest corporate tax rate in the country.

Alberta promotional literature states that: By maintaining the lowest corporate tax rate in the country, ensuring that the programs that the government undertakes remain consistent from year to year and by staying out of the business of being in business, the business community has developed confidence in the Government of Alberta. The result of this confidence is the growth rate that the province has sustained over the past decade. This in turn has allowed the government to focus much of its energies on education, transportation and other infrastructure.

The following is a representative list of programs and initiatives that are currently being undertaken by the Government of Alberta. . The list is not all-inclusive but is a cross section of current projects. Projects are categorized by ministry. The proportion of provincial budgets spent in the SAL region were determined by inquiry from the respective department and personnel. Some departments were unable to quantify the portion of budget allocated to the SAL region. Criteria for inclusion were that a project was consistent with the various ministries core business, and that significant resources were allocated to the Southern Alberta economy.

4.1 DEPARTMENT OF LEARNING:

Provincial Education $4.8 Billion Percent of students in the SAL region: 48.4%

New Centuries School Plan (Funding 2000 -2003) (Three year total)

Provincial Infrastructure $775,390,973 Percent in the SAL region: 51.15%

Education remains a provincial priority, with over $4.8 billion invested within the province in 2002/03; Government spending on the learning system again totalled almost a quarter of the provincial budget. Investment in Learning increased $298 million (6.6%) from the previous fiscal year. Approximately 95% of the Ministry's expenses were comprised of grants to provide programs and help Alberta's learners. Included are increased grants to postsecondary institutions of $47 million and a $31 million commitment for a research facility at the University of Calgary. Alberta Learning invested $89 million in loans to students in post-secondary institutions in 2002/03.

It is the ministries position that as more and more Albertans embrace learning at all stages of life, personal growth and provincial economic progress will continue. The high tech segment of economy of the SAL region is growing at an ever-increasing rate: As other segments of the SAL region economy grow and develop they will also need better-educated workers. This priority on education will allow the SAL region to sustain this growth and have the supply of educated and qualified workers required for future high tech trends.

4.2 TRANSPORTATION:

Highway Development and Maintenance

Funding: $529,520,000 **Percent in the SAL region: 40%**

Alberta has roughly 30,000 kilometres of provincial highways with a replacement value of approximately $20 billion. Since over 60 per cent of the province's economy is export-based, the government of Alberta has made the ability to move goods and people safely and efficiently a top priority. During the past fiscal year the province established a director of transportation innovation position to explore new and better ways to improve the Highway infrastructure.

This highway infrastructure is important to the SAL region both as a means of exporting the agricultural, resource, and manufactured commodities that are produced within the region, and also due to the fact that virtually all of the products manufactured in the northern region of the province are exported south and hence are transported through the SAL region. The benefit of a superior highway infrastructure will increase as the province continues development of the north south trade corridor that originates in northern parts of the province, passes through Calgary and on through the middle of the SAL region to the United States and inter- provincial border crossings. All major inter-provincial transportation routes are also through the SAL region.

Municipal Partnerships

Provincial Funding: $127,525,000 **Percent in the SAL region: 40%**

The Alberta Cities Transportation Partnership provided cost-shared funding to Alberta cities, including the five cents per litre funding arrangement with Calgary and Edmonton. The other 15 cities received per capita grants for eligible transportation projects. The majority of these projects address local infrastructure needs as identified by the municipalities. The ICAP Agreement is a partnership between the federal, provincial and municipal governments.

This project has had impact in the SAL region as it has been used to develop the series of roads and the LRT system through the City of Calgary. This is an integral component of the transportation network that facilitates both the movement of goods and services and supports the flow of people required to facilitate the economic output from the larger urban areas. Other projects undertaken with this program have been upgrading to the main connector roads in the City of Lethbridge as well as projects in the City of Medicine Hat and Red Deer.

Municipal Water and Wastewater Grants:

Provincial Funding: $36,554,280 **Percent in the SAL region: 40-50%**

Cost-shared financial assistance was provided to 135 cities, towns, villages and eligible hamlets, for over 233 new and ongoing municipal water treatment and wastewater treatment projects. In 2002-03, a total of $25.3 million was provided for eligible provincial projects.

This grant program has had a significant impact in the SAL region as it has been used to upgrade the municipal water systems and wastewater handling facilities. These upgrades have been necessary in order to service the increasing population and industrial base.

Water Management Infrastructure:

Provincial Funding: $37,363,000 **Percent of projects in the SAL region:> 90%**

Construction of the dam and reservoir component of the Little Bow River project was completed in the year ended 2003. Upgrading of the Little Bow canal component of the project was substantially completed. Repairs to Lethbridge Northern Headworks diversion dyke and main canal were completed. Designs for rehabilitation of the Carseland-Bow River Headworks system were advanced. Engineering contracts were awarded for Reach 4 and Reach 5 of the main canal and the Lomond Crossing of McGregor Reservoir. Design and construction was undertaken on seventeen small water management infrastructure projects throughout the province at a total approximate cost of $12.0 million. This level of investment has been typical for the last number of years.

The irrigation system in southern Alberta is the lifeblood of the agriculture industry. As well is a major support to many community municipal water systems in the region. Estimates of the value of the agriculture and related products in the region are approaching $2 Billion per year. Alberta Food Agriculture and Rural Development estimates that irrigated land comprises approx 4 % of the total land under cultivation and produces 20 % of the total output in the province. The impact of these projects cannot be understated to the SAL region economy.

4.3 MUNICIPAL AFFAIRS

Unconditional Municipal Grant Program

Provincial Funding $37,500,000 **Percent in the SAL region: 49%**

The Unconditional Municipal Grant Program included provincial payments of $1.8 million for targeted assistance, $13.5 million to improve governance, administrative services or service delivery practices through the Municipal Sponsorship Program, including a 25 per cent bonus for eligible projects involving intermunicipal cooperation.

Regional Partnerships Initiative

Provincial Funding: $375,000

This program encourages three or more municipalities to explore opportunities for cooperation in a variety of areas including economic development, transportation, and service delivery to citizens and business. The initiative grew from 16 to 23 regional partnerships involving 203 municipalities throughout the province.

These programs serve to help the various municipal governments develop and maintain the kinds of infrastructure that is necessary to support the increasing industrial base and accompanying population. In addition they serve the purpose of helping to keep the local property taxation low which in turn continues to drive the economic growth within the province is over the last decade.

4.4 MINISTRY OF SUSTAINABLE RESOURCE DEVELOPMENT:

Forest Land and Resource Management:

Provincial Funding $25,000,000 **Percent in the SAL region: 135**

Forest Land and Resource Management initiatives are designed to provide a balanced forest policy, legislation, and regulatory framework. The ministry's objective is to increase the value of Alberta's forest products through unleashing innovation, competing in the global marketplace, leading in learning and strengthening Alberta's economy; to protect forest health through effective detection and management strategies with shared responsibility with industry and municipal and federal governments; and to encourage sustainable forest management planning and practices.

During 2002-03, Alberta's forest industry had to address increased threats to the health of the forest as well as growing pressure from the international trade community. The ongoing softwood lumber dispute with the United States continued to pose a challenge to maintaining the value received for Alberta's forest products. In order to support the programs associated with this core business, the department spent $25.0 million, down slightly from the previous year's expenditure of $28.5 million.

With approximately twelve percent of Alberta commercial forests in the SAL region and the dollar value of forest production approaching $103 million, the forest industry still has a significant impact on the local economy.

Rangeland Management

Provincial Funding $9,635,000

Alberta's rangelands support a variety of uses, such as livestock grazing, energy extraction, recreational use and wildlife habitat. The objectives of the Rangeland core business SRD employs a strategic approach which include:

- Provide clear, balanced policies, legislation and regulations to maximize the benefits received from public rangelands;
- Ensure secure, long-term access to public rangeland grazing for Alberta's livestock industry;
- Promote and support sustainable range management practices through research and knowledge transfer;
- Encourage good stewardship practices by monitoring utilization of public rangeland; and
- Manage public rangelands in a manner that supports the co-existence of multiple uses and resource values.

4.5 MINISTRY OF ENVIRONMENT:

Environmental Leadership

Provincial Funding $13,400,000

The Ministry of Environment spent $13.4 million on Environmental Leadership to build and enhance relationships with Albertans. The key expenses within this core business included the development and implementation of *Albertans & Climate Change: Taking Action*, as well as expenses associated with the *Southern Alberta Landscapes: Meeting the Challenges Ahead*, the Northern East Slopes Regional Strategy, the *Water for Life* strategy, cross-ministry regulatory reviews, the Ministry business plan, and strategic planning.

Environmental Stewardship

Provincial Funding $15,600,000

The Ministry spent $15.6 million on the Environmental Stewardship core business. One of the major expenses included grants to the Waste Management Assistance Program to assist municipalities in establishing regional waste management systems and upgrading landfills with modern waste disposal infrastructure. Other activities included the development of public education programs and online access to information. The Ministry continues to encourage and develop awareness, understanding, environmentally responsible behaviour and decision-making by individuals, communities and industries.

These programs serve the SAL region in a two-fold purpose. One of the attractions of people locating in Southern Alberta is the natural beauty of the area. These kinds of programs work to sustain that natural attraction and beauty of the area. The second purpose is to control the environmental demands that are placed on businesses, which in turn works as a business attraction to the region.

4.6 Alberta Food Agriculture and Rural Development

The ministry is responsible for the delivery of several farm income assistance programs, Farm Fuel Benefit Program, Alberta Farm Credit Stability Program, Feeder Association Loan Guarantee and disaster compensation under the federal Disaster Financial Assistance arrangements.

Program	Funding
Insurance	876,950,000
Farm income support	534,939,000
Industry development	42,989,000
Sustainable agriculture	32,882,000
Planning and competitiveness	32,337,000
Farm fuel distribution allowance	30,012,000
Lending	28,661,000
Infrastructure assistance	26,998,000
Total	$1,605,768,000

These programs are considered by the ministry to be a vital component in ensuring the region's agricultural producers are able to compete and stay viable. If the economy of the SAL region is to maintain its economic growth it is vital that the agricultural industry remain vibrant and successful. These programs in turn are essential to maintain agriculture in the region.

4.7 Summary

The above programs appear to be consistent with the government policy of creating the premier business climate in the world and then to let businesses do their thing, although the stated initiatives by the various ministry's may be considered optimistic. The overall impact of the total scope of government initiatives appears to have been effective.

By maintaining the lowest corporate tax rate in the country, ensuring that the programs that the government undertakes remain consistent from year, the business community has demonstrated confidence in investing in the SAL region and the province. By focusing its energies on education, transportation and other infrastructure the province has developed an environment for business that is the envy of the rest of the country.

5.0 Summary/Observations

5.1 Summary

The SAL region includes one half of Alberta's population. The demographics in SAL are highly variable across the region. 81% of the population lives in urban area. Two thirds of the SAL population lives in the Calgary area, which comprises only a small piece of the region by area. Ninety four percent of the Calgary census division (CD 6) population is classified as urban. The urban residents in other census divisions within the SAL region are as low as 26% of the census division's population. The more remote areas in the SAL region have population densities as low as 0.5 people per square kilometre while the Calgary region including it's surrounding rural municipalities has a population density of 81 people per square kilometre.

This diversity within the region is also reflected through employment activity. Eight percent of Calgary's employment is in primary industries while 12% of the SAL region's employment is in primary industries. Forty six percent of the Hanna/Oyen area's employment is in primary industries, but has only 0.8% of the region's population.

The SAL region accounts for 46% of Alberta's economic activity. The overall region reflects a balanced economy with agriculture, oil and gas, and manufacturing producing proportionate shares of new economic production coupled with a strong personal and business service industry. The region has a high self sufficiency ratio with ninety one percent of all inputs purchased within the region.

Population growth in the region from 1976-2001 is faster than the provincial average, which in turn is faster than the federal average growth. Population growth, both rural and urban, however is concentrated in the Calgary – Red Deer and Calgary - mountain corridors. Population growth in all other parts of the region, fall behind the federal average. Some census divisions within the SAL region are experiencing negative or no growth.

Average income per tax return within the region follows a similar pattern to population growth with the higher incomes in the Calgary region.

Quality of life indicators such as family income and quality of life services including: health and social, education, and government services, also vary throughout the SAL region. Overall indicators suggest the region has an above average standard of living as compared to provincial and federal quality of life indicators. Again the Calgary region scores significantly higher than the regional average with some areas well below the regional average.

5.2 Observations

Overall the SAL region represents a progressive and balanced economy coupled with vigorous population growth. The majority of the regional growth is in the Calgary region with more subdued growth in the Red Deer, Medicine Hat and Lethbridge regions.

There is a marked trend of concentration of both the rural and urban population into the urban and immediate surrounding rural areas. These urban areas represent higher incomes, a higher level of available services, and more employment opportunities in the manufacturing and service type industries. Conversely the population and economic opportunities appear to be moving out of the more remote areas within the SAL region.

APPENDIX B

APPENDIX B: Value of Sales and GDP SAL Region ($ million)

	Provincial Value of		SAL Region Value of		Sales SAL sales
	Sales	GDP	Sales	GDP	Proportion
1 Agricultural and related services Ind.	4,113	1,822	1,999	886	49%
2 Irrigated Agriculture	172	81	172	81	100%
3 Feedlots/Confined Livestock Operations	4,125	774	3,478	653	84%
4 Fishing and trapping industries	4	3	1	1	20%
5 Logging and forestry industries	819	317	103	40	13%
6 Mining, quarrying and oil well industries	7,592	6,001	3,427	2,709	45%
7 Petroleum & Natural Gas	25,640	14,706	8,769	5,030	34%
8 Meat Slaughtering	4,240	495	3,873	452	91%
9 Other Food Processing	1,590	233	834	122	52%
10 Refineries	535	34	227	14	43%
11 Other Manufacturing industries	30,201	10,568	14,095	4,932	47%
12 Construction industries	22,506	8,217	9,975	3,642	44%
13 Transportation and storage industries	11,010	6,190	5,222	2,936	47%
14 Communication and other utility Ind.	4,758	3,046	2,166	1,387	46%
15 Other utilities	3,433	2,416	1,563	1,100	46%
16 Wholesale trade industries	9,495	5,942	4,290	2,685	45%
17 Retail trade industries	8,069	5,029	3,564	2,221	44%
18 Finance, insurance and real estate Ind.	25,635	17,892	13,016	9,085	51%
19 Business service industries	11,092	7,048	6,360	4,042	57%
20 Educational service industries	341	248	145	105	42%
21 Health and social service Ind.	2,807	2,045	1,193	869	42%
22 Accommodation and food services Ind.	7,073	3,465	3,334	1,633	47%
23 Other service industries	2,603	1,799	1,225	847	47%
24 Operating, office, cafeteria and laboratory supplies	8,357	0	3,934	0	47%
25 Travel & entertainment, advertising & promotion	4,399	-1	2,071	0	47%
26 Transportation margins	3,871	0	1,836	0	47%
27 Non-profit institutions serving households	1,414	961	666	452	47%
28 Government sector	21,177	12,499	7,951	4,693	38%
TOTAL	227,071	111,830	105,490	50,615	